

# Retirement Planning Checklist

**Review of assets and investments**

- Do you know how your investments can work for you to give you a paycheck in retirement?

**Debt consolidation**

- Do you know how much debt you have? Is it manageable?  
Know how to consolidate debt to be more in control.

**Know the amount**

- How much money do you need to retire and stay comfortably retired?

**Cash flow planning**

- Not all money is created equally. Learn why \$10,000 equals \$6,658 in retirement.

**Insurance needs**

- Do you feel like your family is protected in case of an emergency?  
Make sure that your loved ones are well taken care of in any unexpected event.

**Legacy planning**

- Being organized now can help your family later. Make sure that your family is well-protected and your desires are made clear.



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